MODULE 8

Knowledge to Action

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MODULE 8 – KNOWLEDGE TO ACTION

“Knowledge is the enemy of disease. That is a powerful metaphor. Applying what we know already will have a bigger impact on health and disease than any drug or technology likely to be introduced in the next decade… There are huge gaps in knowledge application, and a link is needed between knowledge and effective decision-making…”

Tikki Pang, Muir Gray, Tim Evans
The Lancet
January 28, 2006

Overview

Knowledge derived from research and experience may be of little value unless it is put into practice. As a way of thinking about this challenge and how to start closing the “know-do” gap, the process of knowledge translation has emerged. It is defined as “the synthesis, exchange, and application of knowledge by relevant stakeholders to accelerate the benefits of global and local innovation in strengthening health systems and improving people’s health.”

Knowledge to action is considered one of the six principles of Ecohealth, as defined by Dr. Dominique Charron of Canada’s International Development Research Centre. It is an aspect of applied research that is often absent in traditional research and is important in ensuring that Ecohealth research is embedded in relevant social and economic issues. In an ideal world, those who will take actions to improve a particular situation – the decision-makers and policy-makers – will be stakeholders in every Ecohealth study. Realistically, this occurs much less often than we would like, however, and a good understanding of i) how to best communicate knowledge in such a way that it leads to action, and ii) when decision-makers and policy-makers should be involved in the research process, are important. This module aims to provide a brief overview about what knowledge to action means, why it is an important part of Ecohealth research and how it can be achieved through linkages with decision/policy making.
Learning Objective:
Identify different kinds of knowledge and how they contribute to Ecohealth understanding.

Activity 1:
Handout; debrief

Advanced Learning Objective:
Identify and critically assess strategies to communicate research to multiple audiences.

Activity 2:
Individual; prepare brief speech

Learning Objective:
Recognize the link between research, policy, and action

Activity 3:
Review and discuss articles

Learning Objective:
Write succinct and persuasive policy briefs that convey a policy vision and recommend specific policy instruments.

Activity 5:
Individual writing; analysis

Learning Objective:
Engage a variety of stakeholder groups at critical times in the research process.

Activity 4:
Handout; evaluation

Learning Objective:
Be aware of the need for plain language communication and to build skills in using clear, plain language.

Activity 6:
Small group work
Module Aims

This module will provide a brief overview about what knowledge to action means, why it is an important part of Ecohealth research and how it can be achieved through strategic engagement with a variety of audiences. This module will guide the trainers to:

- Identify different terms and concepts used in moving knowledge into action
- Provide background information about processes and strategies for creating and applying knowledge in Ecohealth
- Provide activities that encourage participants to interact in diverse ways during the training, thereby exposing them to a range of communication techniques useful for knowledge transfer.

Why is this topic important?

One of the features that distinguishes Ecohealth from discipline-based, curiosity-driven, or theoretical research, is its participatory engagement with stakeholders; that is, the people affected by the issues which an Ecohealth research project investigates are actively involved in the research process; this includes communities of different types, and policy-makers.

Knowledge to action is considered one of the six principles of Ecohealth (Charron 2012). It is an aspect of applied research that is often absent in traditional research and is important in ensuring that Ecohealth research is embedded in relevant social and economic issues. As explained by Charron, “the notion that knowledge from research is used to improve health and well-being through an improved environment is fundamental to an ecosystem approach to health.”

Knowledge to action is important topic of Ecohealth research because:

- Ecohealth research generates knowledge to solve problems and to implement positive changes
- Single disciplines cannot solve the kinds of complex public health, social, and environmental problems being faced in the twenty first century
- Much research only ends with recommendations that are not implemented or even necessarily shared with those who can help bring about change.

In a rapidly changing world, policies informed by scholarly evidence are becoming increasingly important as a means for decision-makers to develop more effective and feasible policies and programs, known as “evidence-based policy.” Nevertheless, Ecohealth, with its complex practice and theory, can be
difficult to articulate clearly in policy terms. The challenge is how Ecohealth investigators and practitioners work with policy-makers and to help equip them with the evidence they need, as well as how to tailor research findings to the needs of the policy-makers. Many research reports related to Ecohealth are currently available to policy-makers, but are in complex technical languages or forms that are difficult for them to digest and use effectively, given their limited time and attention spans.

Key Concepts

What does knowledge to action really mean? What are the basic concepts around this topic?

A number of concepts need to be clarified when studying this module including Knowledge to action (KTA), Knowledge Translation, Knowledge Transfer (KT) and Knowledge Exchange (KE). In literature, the terms of KTA, KT and KE are used synonymously. In practice, the specific words used are not really important – what is important is how these terms are operationalized. However, according to Charron (2012) knowledge to action is preferred to the commonly used knowledge translation. It reflects the point that KTA is an interactive process that balances knowledge creation and problem solving actions implemented in a collaborative context with data-driven collaborative analysis and research to understand underlying causes enabling future prediction about individual, community, and organizational change. Table 8.1, below, lists the terms and their definition.

Guiding Questions

1. What kind of knowledge is relevant to Ecohealth? How can such knowledge be harnessed to influence real world action?
2. What is the role of the research community in implementing knowledge to action strategies?
3. Why should policy-makers be engaged?
4. How can knowledge be best structured for use by communities?

Basic Learning Objectives

After completing this module, learners will be able to:

1. Be aware of the need for plain language communication and build skills in using clear, plain language
2. Identify different kinds of knowledge and how they contribute to Ecohealth understanding

3. Recognize the link between research, policy and action

4. Write succinct and persuasive policy briefs that convey a policy vision and recommend specific policy instruments

5. Engage a variety of stakeholder groups at critical times in the research process.

**Advanced Learning Objectives**

After completing this module, advanced learners will be able to:

1. Identify and critically assess strategies to communicate research to multiple audiences.

**Background Information**

**Table 8.1 Definition of terms similar to Knowledge to action**

<table>
<thead>
<tr>
<th>TERMS</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge translation</td>
<td>“The exchange, synthesis, and ethically-sound application of knowledge – within a complex system of interactions among researchers and users – to accelerate the capture of the benefits of research for [people] through improved health, more effective services and products, and a strengthened health care system.” Canadian Institutes of Health Research (<a href="http://www.ncddr.org/kt/products/focus/focus18/">http://www.ncddr.org/kt/products/focus/focus18/</a> accessed June 10, 2012).</td>
</tr>
</tbody>
</table>
| Knowledge transfer | “A systematic approach to capture, collect, and share tacit knowledge in order to transfer it to become explicit knowledge. By doing so, this process allows for individuals and/or organizations to access and utilize essential information, which previously was known intrinsically to only one or a small group of people.” Government of Alberta (http://www.pao.gov.ab.ca/learning/knowledge/transfer-guide/index.html accessed May 31, 2012). “Knowledge transfer is about transferring good ideas, research results and skills between universities, other research organizations, business, and the wider community to enable innovative new
products and services to be developed.” UK Department for Business Innovation & Skills (http://www.bis.gov.uk/policies/science/knowledge-transfer accessed June 10, 2012).

**Knowledge exchange**

“Knowledge exchange is collaborative problem-solving between researchers and exchange decision makers that happens through linkage and exchange. Effective knowledge exchange involves interaction between decision makers and researchers and results in mutual learning through the process of planning, producing, disseminating, and applying existing or new research in decision-making.” Canadian Health Services Research Foundation (http://www.chsrf.ca/keys/glos-sary_e.php accessed June 10, 2012).

**Knowledge into products**

“A systematic process of turning scientific evidence and audience research into programs, policies, interventions, guidelines, toolkits, strategies, and messages that will assist and support audiences or users in putting science into practice” (Wilson et al. 2011).

**Knowledge to action**

“The notion that knowledge from research is used to improve health and well-being through an improved environment is fundamental to an Ecosystem approach to health” (Charron, 2012). “About an exchange of knowledge between relevant stakeholders that results in action” (Graham et al. 2006).

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### Activities

#### Activity 1

**Knowledge, Action and Public Policy Primer**

*Learning Objective:*

- Identify different kinds of knowledge and how they contribute to Ecohealth understanding.

**INSTRUCTIONS**

This exercise is about how to engage a variety of stakeholder groups at critical times in the research process.

Instructors should provide the *Module 8 – Handout 1 – Activity 1: Knowledge, Action and Public Policy Primer* to participants at least one week prior to the training.
This handout is essential to successfully achieve all learning outcomes for this module. The handout contains valuable background information that supports and enhances the activities.

A brief discussion at the start of the module about key points in the handout may be a good way to introduce the topic.

Alternatively, instructors will need to encourage learners to become familiar with the content of the handout during the course. Learners should supplement the text with their own examples and experiences.

Activity 2

What does your work mean?

Learning Objective:

- Be aware of the need for plain language communication and to build skills in using clear, plain language.

INSTRUCTIONS

In this activity, participants will become sensitive to the inaccessibility (and seeming irrelevance?) of academic language to the general public and learn to express the meaning of their work in clear, plain language.

This is a variation on the 30-second elevator pitch that is popular in business and marketing schools. As an introduction to “media skills” and plain language communication, the (pretend) audience should be either the local media or a community group (women’s group, co-operative, etc).

INSTRUCTIONS TO STUDENTS

Craft a brief speech that will convey to the selected audience what your research means (or what your work means) to them. How do they benefit from what you do – directly or indirectly.

A good talk will use plain language techniques (see Activity 3) and may have a clear “hook” at the beginning to get the audience’s attention. Alternatively, you could try to create a bond with your audience – for example, by discussing something that you have in common with them. Ask the audience questions, if you have time.

Overall, however, make sure to focus your talk on your current research, project, or work and what it means to the daily life of the audience (or the public at large). **Do not discuss what you actually do.** Finding this connection will make it much easier to communicate the real value of your work.
Activity 3

Newspaper review

Learning Objective:

- Identify different kinds of knowledge and how they contribute to Ecohealth understanding
- Recognize the link between research, policy, and action.

INSTRUCTIONS

Have learners bring in a recent newspaper or news magazine. Ask them to go through a variety of articles that relate broadly to human, animal, and/or environmental health in order to:

a) Identify policy instruments (information campaigns, taxes, by-laws, standards, subsidies, taxes, new commissions, etc.)

b) Infer policy directions from the description or critique of the instruments (what is the government really trying to achieve here?)

c) Discuss how what other instruments were available to decision-makers and/or how the current one could be improved using Ecohealth approaches.

This activity can also be done with articles from other sectors (economics, arts, etc.) as the policy instruments are broadly the same, the difference is the use to which they are put.
Activity 4

Plain language writing

Learning Objective:

• Become aware of the need for plain language communication and build skills in using clear, plain language

• Engage a variety of stakeholder groups at critical times in the research process.

Advanced Learning Objective:

• Identify and critically assess strategies to communicate research to multiple audiences.

INSTRUCTIONS

See Module 8 – Handout 2 – Activity 2: Background on Plain Language Writing at the end of this Module.

Give each participant either a paragraph from a journal article, an article abstract, or the whole article (even an Ecohealth article!), and ask them to rework it so that the language is accessible to the general public. The activity works best if everyone is given the same text, which is then subjected to peer review and discussion. This can be done in English or in a language in which they are most comfortable.

Classes with more time can evaluate the reading level of the revised paragraphs using one of several plain language “tests.” There are a number of different tests (Flesh-Kincaid Readability Tests, Fry Readability Formula, Simple Measure of Gobbledygook, etc.), all of which focus on sentence length and the number of syllables in a text. A number of free on-line calculators are available, such as:


This website also includes Spanish and French readability formula.

http://www.readability.info/

This site allows you to upload a Word document or website page for testing.

Microsoft Word also includes the Flesh-Kincaide Reading Ease and Grade Levels tests directly in the software program – it is generally found in the “options” section of the spelling and grammar check (depending on the version of the software you have).
Readability tests (in English) judge the average reading comprehension level of the text. Plain language writing should aim for between a Grade 4 and 6 reading comprehension level or lower, depending on average literacy levels in the country.

In places with very low literacy, a shift to oral communication (plain language for the radio), or pictorial and other visualization techniques may be preferred over text. In general, however, all plain language techniques should include more than “just language” – they should also focus on design and graphics.

Activity 5

*Individual or small group exercise: writing a policy brief/briefing note*

**Learning Objective:**

- Recognize the link between research, policy and action
- Write succinct and persuasive policy briefs that convey a policy vision and recommend specific policy instruments.

**Advanced Learning Objective:**

- Identify and critically assess strategies to communicate research to multiple audiences.

**INSTRUCTIONS**

Have participants draft an outline of a policy brief on a topic of their choice, focusing on articulating a clear argument and noting the evidence they would use for each section, and where more information would be needed to complete the draft. The policy brief should clearly convey the policy (or policies) that are being put forward, as well as the policy instruments that are recommended to implement the policy.

The more specific the policy brief (i.e. exactly which government agencies should be involved, at what level (local, provincial, national), how the recommendations fit with current policies, etc.), the better.

A longer course may include writing a complete policy brief as an assignment in the course.
Activity 6

*Media skills training: “27 words, 9 seconds, 3 messages”*

**Learning Objective:**

- Recognize the link between research, policy and action
- Engage a variety of stakeholder groups at critical times in the research process.

**INSTRUCTIONS**

In this activity, students will recognize the interests of media in covering Ecohealth issues, and become introduced to media skills training that can help positively leverage the communication opportunities provided by the media.

After providing some background material about the topic, divide learners into groups of three. Have each group develop a message on a different topic using the 27/9/3 template (see Module 8 - Handout 4 – Activity 6: Media Skills in this module) of “27 words, 9 seconds, 3 messages” and present the message back to the larger group for comment.

A longer session could be set up as a videotaped “town hall,” where people work individually and each participant presents his/her statement to the group, and then takes questions from the audience. This allows participants to work on their oral and non-verbal communication as well as their re-direction and question answering skills. Audience members can be asked to play different roles (i.e. difficult parents, local media, skeptic, doomsday prophet, etc). It is important to challenge the presenters to take all questions professionally and answer them seriously (i.e. no “mocking” of bizarre questions, etc.) – as you never know what will end up “on-the-air.”

**Sample Timetable: Module 8**

The activities in this module can be taught as a one day intensive course, as two half-day sessions, or as separate activities in different classes.

If possible, Module 8 – Handout 1 – Activity 1: Knowledge, Action, and Public Policy Primer should be given to learners before the training session.

Activities 1, 2, 3, and 4 are somewhat “shorter,” while Activities 5 and 6 require additional time. Instructors may want to consider selecting one of each, if teaching for only a half-day session, as per the example in the sample timetable below.

Activity 2 can serve as an icebreaker. Taking the time to explain the purpose of the Activity 2 (to focus on the purpose of one’s work, not what one does)
is very important to ensure that the exercise is both challenging and meaningful. Participants should be given at least 5-10 minutes of quiet time to prepare their individual talks.

**Activities 1, 2, 3 and 5: Elevator Speech, Newspaper Review and Policy Briefs**

<table>
<thead>
<tr>
<th>TIME</th>
<th>ACTIVITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 – 8:45</td>
<td>Activity 1: Introductory discussion about Module 8 – Handout 1 – Activity 1: Knowledge, Action, and Public Policy Primer</td>
</tr>
<tr>
<td>8:45 – 9:30</td>
<td>Activity 2: What does your work mean? Preparing an elevator speech</td>
</tr>
</tbody>
</table>
| 9:30 – 10:15| Introduce Activity 3: divide class into small groups to review articles and identify policy instruments  
Go from group to group facilitating the discussion of policy instruments, and linking them to policy positions. |
| 10:15 – 10:30| Break                                                                                                                                   |
| 10:30 – 11:00| Convene larger group and discuss results for each article.  
Ask for alternative instruments that could have been used, or that are used elsewhere.  
Have the group think about how similar policy instruments can lead to different policy positions. |
| 11:00 – 12:00| Introduce Activity 5: Writing a Policy Brief.  
Divide into small groups, or have people work individually.  
Have individuals or groups draft a detailed outline of a policy brief – check on groups to make sure the overall argument is succinct and coherent, and that specific policy instruments are being recommended.  
Allow groups to indicate where more research is needed (i.e. to identify specific government agencies, existing programs, etc.) and focus on the overarching policy and policy instruments suggested – not the details of the problem. |
| 12:00 – 12:30| Discuss policy brief exercise in general, linking it to the need for clear, specific and well-reasoned arguments for policy-makers. |
Activities 4 & 6: Plain Language Communication and Media Skills

<table>
<thead>
<tr>
<th>TIME</th>
<th>ACTIVITIES</th>
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<tbody>
<tr>
<td>8:30 – 9:15</td>
<td>Introduce Activity 4 and provide background regarding the importance of plain language writing. Provide individuals with a paragraph of text to “translate” into plain language.</td>
</tr>
<tr>
<td>9:15 – 9:45</td>
<td>As individuals work on the “translation” go from person to person reminding them of some of the techniques (active voice, short sentences, etc.). At the end of the time, ask them to run their text through an online (or Word-based) readability test.</td>
</tr>
<tr>
<td>9:45 – 10:15</td>
<td>Convene larger group and discuss the process and results. Ask for volunteers to read their plain language text. Ask for examples of the different techniques and discuss any challenges. Have the group discuss the social importance of plain language.</td>
</tr>
<tr>
<td>10:15 – 10:30</td>
<td>Break</td>
</tr>
<tr>
<td>10:30 – 11:50</td>
<td>Introduce Activity 6, and explain assignment to class. Divide into small groups, or have people work individually.</td>
</tr>
<tr>
<td>10:50 – 11:30</td>
<td>Group should work on their 5-step communication plan – with limited time, you may want to skip the third step (fleshing out the argument).</td>
</tr>
<tr>
<td>11:30 – 12:00</td>
<td>Convene larger group and discuss the process and results. Ask for volunteers to read their communication statements and see if there is a clear 27/9/3 “sound bite.” Have the group discuss the different approaches and the need to have some control over the message sent to the media.</td>
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Evaluation

- Evaluating pre-existing KTA understanding through brainstorming, discussion, group work, and presentation
- Trainers can use pre/post testing to evaluate learners’ change in understanding the topic
- Several activities can be turned into assignments (i.e. plain language activity, policy brief, newspaper article review, media statement, etc.)
- Trainers can evaluate their teaching success by keeping a notebook that records the activities and teaching approaches that they felt worked best each time they offered the course. The characteristics of their target learners should also be recorded for each class. Trainers can periodically find approaches and activities that consistently allow learners to meet their goals.
**Terminology**

**KT, KE, KTA** are presented in Table 1 in this module

**Public Policy maker**
Someone involved in the formulation of policies and/or who sets the plan pursued by government.

**Stakeholder**
Someone or something that can affect or be affected by a situation or any action to address a situation.

**Communication channel**
The medium through which a message is transmitted to its intended audience, such as print media, or television.

**Communication vehicle**
The specific way a message will be delivered (i.e. brochure, public service announcement, etc).

**Plain language**
Succinct clear writing designed to ensure the reader understands as quickly and completely as possible.

**Policy entrepreneur**
Stakeholders who, from outside the formal positions of government, introduce, translate, and help implement new ideas into public practice.

**Policy statement**
Defines the problem, sets the goals that are to be achieved, and indicates the instruments or means whereby the problem is to be addressed and the goals achieved.

**Policy instrument**
Means chosen on how to address the problem and achieve the policy result.
Key References


Additional References


Knowledge, Action and Public Policy Primer

What is the nature of knowledge?
Noted systems thinker Russel Ackoff classified the content of the human mind into the following five categories (Ackoff 1988):

1. **Data**: symbols
2. **Information**: data that is processed to give meaning or be useful – answer “who, what, where, and when” questions
3. **Knowledge**: application of data and information – answer “how” questions
4. **Understanding**: appreciation of “why” questions
5. **Wisdom**: evaluated understanding.

Ackoff felt that the first four categories are backward looking (i.e. trying to understand previous experience), and the last – wisdom – is forward looking. Wisdom, however, is also very individualized, hence our respect for “elders” and those with much experience to share. Understanding brings in the normative nature of knowledge – what is included in our understanding depends on the scale of the initiative and the perspective (and wisdom!) of the observer (See Module 4: Using Systems Concepts in Ecohealth).

Knowledge, the focus of this section, is defined as: the facts, feelings or experiences known by a person or group or people, the state of knowing, and/or the awareness, consciousness or familiarity gained by experience or learning (HarperCollins 2009). **Knowledge, understanding, and wisdom** assist in the presentation, organization, communication, and reflection of experiences to find patterns that can be extrapolated to new situations.

There are many different kinds of knowledge; these are not limited to scientific facts or findings. Ecohealth research acknowledges a wide variety of forms of knowledge, including lived experience, indigenous knowledge and the non-science based insights that are gained through engagement with the arts and humanities.

In a presentation to the 2012 Ecohealth conference in Kunming, Dr. Valerie Brown highlighted seven different kinds of knowledge that frame her work on transformation science: biophysical (which gives facts); social (tells about customs); ethical (provides rules); aesthetic (links to suitability); sympathetic (unites people – we/us/us all); personal (brings in identity); and reflective (helps discover patterns). In her view, transformation science relies on all seven types of knowledge to arrive at a coherent, holistic body of knowledge. It combines subjective and objective knowledge and is based on the idea of collective learning (Brown 2012).

While much of knowledge translation literature focuses on technical syntheses of “objective” research findings, such as systematic reviews and meta-analysis, Ecohealth researchers...
acknowledge a similar need to go beyond this focus on one kind of information (i.e. scientific studies) to bring together a wide range of “ways of knowing” to improve the quality of action “on-the-ground” – locally, regionally, and internationally.

Following on the lines of the creation of “best evidence pathways” in the health sector, Ecohealth approaches can lead to new pathways or suggestions for interventions that incorporate the knowledge of a wide range of stakeholders – pathways to sustainability, or transformation (i.e. Leach et al 2007; Thompson et al 2011). The systems approach helps identify “points of intervention” in systems. There is a strong correlation between these points and the recommended actions that arise from Ecohealth research and/or practice (see Module 4: Using Systems Concepts in Ecohealth). By virtue of being grounded in many different kinds of knowledge, Ecohealth “pathways” consider from the outset socio-cultural, economic, and environmental parameters. Thus, they are less likely to be completely rejected by the key stakeholders (who helped frame the findings) or to become unwanted responsibilities.

Knowledge is generated from a wide range of information resources, and the emphasis of the Ecohealth approach on gender, equity, stakeholder participation, and community-engagement are all in the service of improving our knowledge of the social-ecological context of the issue at hand (see Module 2: Participation and Module 6: Equity and Gender).

An important element of knowledge translation is the ability to link knowledge generated to existing change-processes, or to leverage it to help create new change processes. Doing so involves understanding early on who the potential knowledge users are, and what their interests are, or could be, in the Ecohealth project.

**How can knowledge be harnessed to influence real-world action?**

In order to implement a strategic approach of “knowledge to action” (Figure 8.1) it is important to think about who the key stakeholders are, and their communication preferences. Outcome mapping (Earl et al 2001) is one formalized approach to thinking about who the key stakeholders are, and how the information generated from a project can be most strategically used to influence change in communities.
Other, less systematic approaches – such as brainstorming – are also applicable.

Understanding who the “knowledge users” are is critical. Knowledge users are members of the target audience for the initiative. They may include senior policy analysts or members of an at-risk population, as well as secondary knowledge users such as journalists, media professionals, and community leaders, etc. Ideally, knowledge users are identified very early in the research process and are then engaged in its design and implementation. This creates a sense of ownership among this critical audience for the eventual findings of the study, and identifies follow-up opportunities and plans.

It is important to bear in mind that knowledge to action is a normative process – what is considered to be “knowledge” generated by the projects, and the suite of recommended actions that arise from the study, can have implications for society at large. There are significant power imbalances that can arise, particularly when the results of the project challenge the status quo. This is another important reason to engage knowledge users early on in the process, so that they are not “surprised” by the eventual findings, and thus potentially more resistant to them. It is also a reason that those most affected by a project have a clear and strong voice, particularly where marginalized populations are involved. Dominant stakeholders (government officials, bureaucrats) tend to be those who already have power – part of an Ecohealth project may be to help more vulnerable populations find their voice in the change process.

The sustainability of KTA projects thus becomes an issue. It is important to be honest in terms of what support is available to the knowledge to action processes and the timelines that those involved in the Ecohealth project are working along. It can be difficult for
researchers to obtain funding for KTA projects, as they may be seen as “development” and not research initiatives. Nonetheless, there are always things that can be done (basic educational materials, support writing policy briefs, etc.) and an honest and open approach will build the necessary trust among the stakeholders that will serve everyone well in the future. The more limited the time-frame and resources, the more difficult it may be to get the truly powerful stakeholders to the table. In that case, researchers need to work where they are with the people who are supportive – KTA efforts focused locally can also be very influential. Not every Ecohealth project will change the world, but – done well – many will have long-term influence in an area (see, for example, Charron 2012; VWB One Health Compendium; IDRC Ecohealth case study series – all available online).

While much attention is often paid to identifying key stakeholders and analyzing either their potential role in a project, or their power (see Module 3: Participation and Module 6: Equity and Gender, also IIED 2005), less attention is often paid to the place where this participation will take place. In Ecohealth projects, this place can sometimes be thought of as another stakeholder – it can dramatically influence who comes to meetings/events and the kind of engagement and conversation that take place.

As architects and geographers know, place matters. Taking a group of interested policy-makers for a guided tour of a community, or a watershed, or a sewage treatment centre can build a sense of community and provide a powerful introduction to the issues being addressed by an Ecohealth study. Meeting policy-makers in their own offices can be a sign of respect. It can also be very intimidating for people not used to official environments and the symbols of power that accompany them. This may make casual conversation difficult, but may provide a good location for relationship building and a detailed discussion of a policy brief or position paper. Thinking about who you work with, how you engage them (reciprocating!) and where you meet them can all have both operational and strategic significance for your project (Figure 8.2).
Effective communication is a fundamental component of the knowledge to action approach that is best understood in relation to the major stakeholder groups involved in Ecohealth projects. Knowledge brokers are organizations or individuals who facilitate the exchange of information between the researchers and the knowledge users, thus they are most involved in the later steps of knowledge translation. This role can be filled by members of the research team but requires a particular set of skills (strong interpersonal skills, good communication skills, a sound understanding of the knowledge to be exchanged, community interests and policy requirements, and commitment to all parties) to ensure the process goes smoothly (CIHR 2012). The more integrated the KTA process is in the research process, the sooner those with the relevant skills will emerge from the group. Knowledge brokers may also be thought of as “policy entrepreneurs” (see policy section).

The role of the research community in implementing knowledge to action strategies

As mentioned above, the research community (in the natural and social sciences, as well as the arts and humanities) plays a key role in the KTA process, not only in terms of developing and implementing research programs, but also by acting as potential knowledge brokers (or policy entrepreneurs) working between different stakeholder communities. The Canadian Institutes of Health Research (2007) developed a framework to integrate the traditional research cycle (square boxes) with knowledge translation elements. Figure 8.3 illustrates six main opportunities researchers have during the traditional research process to...
facilitate knowledge translation. They are very much in line with the Ecohealth approach, with their emphasis on community engagement and participation.

KT1: Defining research questions and methodologies
KT2: Conducting research (as in the case of participatory research)
KT3: Publishing research findings in plain language and accessible formats
KT4: Placing research findings in the context of other knowledge and sociocultural norms
KT5: Making decisions and taking action informed by research findings
KT6: Influencing subsequent rounds of research based on the impacts of knowledge use.

These six areas represent opportunities to directly engage with key knowledge users in the design, implementation, analysis, and dissemination of the research plan.

Publishing the results of the studies in plain language and accessible formats is a key step, particularly if the research community is to begin a conversation with communities and policy-makers over the findings of the research program (although some would say that if it is left to this late stage of knowledge dissemination it will be too late). Helping contextualize the knowledge and identify potential action items is another important role for the research community.

Figure 8.3 CIHR knowledge translation model, based on the research process
One of the most important lessons that researchers need to remember is that some communication tools (such as research reports, journal articles, posters, and academic talks) are only for academic audiences – they are not very effective for KTA strategies that involve non-academic partners.

Respect for this notion can be demonstrated by thinking about how to talk to the media or other stakeholders interested in your work. The key lesson: **do not talk about what you are doing – talk about what it means.** The public are generally not interested in the whether or not you are doing a case control or a cohort study – they are not interested in the methods you follow or the ways you are controlling for bias – they want to know why you are studying this issue at all – what does it mean for them, and society? Why is it important? Too often scientists focus on their actual study. Then the overall message – and the language and concepts used – are inaccessible to their audience. Practicing the art of saying what your work means, instead of what it is, is an important knowledge to action skill.

**Why should policy-makers be engaged?**

Because Ecohealth projects are embedded in local or regional communities, and are concerned with “real world” and “value laden” issues, they have the opportunity to help shape public policy. Public policy can be defined as designing solutions to real-world problems by presenting value-driven arguments; or as “a course of action or inaction chosen by public authorities to address a given problem or set of problems” (Pal 2010).

Policy-makers in the public policy arena are government personnel – particularly civil servants and government officials (elected or otherwise) who can “work from within” to shape public policy discussions.

Policy-makers can be very local – at the scale of the community or local government. They are also readily identifiable at the national, regional, and international levels, corresponding to a country’s government system. They include city staff, local counsellors, bureaucrats in a wide variety of Ministries, politicians of all stripes, United Nations’ staff, among many others. Identifying policy-makers with shared interests and goals, and policy-makers whose work could be affected by a project early on is an important way to engage them in shaping Ecohealth projects in a way that could have a lasting impact.

One of the biggest barriers to researchers engaging in the policy process is a lack of understanding of what the process is and how it works. While the specific institutional and legal situations vary by country, there are a few important concepts to bear in mind:

- **Public policy is not rational – it is political**

While many policies (particularly narrowly focused and specific ones) are either based on, or incorporate some element of, good scientific knowledge and information, the most important aspect of public policy that researchers need to recognize is that public policy is fundamentally political. This means that it represents the values of the government that is implementing it. Information, facts and “reality” are only one part of the equation – beliefs, ideas and interests also play a key role (Lasswell 1936).

Vickers (1965) describes public policy as the art of judgment – it falls between a judgment of what is (reality) and what ought to be (values). These lead to judgments regarding the best actions to take to move from “what is” to “what ought to be.” These actions can be thought of as policy directions.
• Scientists are only one voice among many

It is worth remembering the huge range of actors that are interested in influencing public policy – scientists and researchers are only one voice among many. Other actors include political parties and influential economic and social lobbyists and groups.

The focus of the Ecohealth approach on participation and engagement with communities and stakeholders is one way to leverage the power of a multitude of voices who can agree to promote certain future actions – these actions are policy statements.

• Policy statements are visions – not dull documents

Policies are often understood to be mechanical or mundane devices that are not accessible to the everyday person. This could not be further from the truth as the reality is that most public policy is not written down.

Public policies are political, and therefore can also be changeable. Only a small fraction of policies are “codified,” or written in to legal documents (laws, standards, etc). Much public policy directs action (and inaction) in a country in a more political sense. This is why those interested in the field of public policy pay an inordinate amount of attention to what elected officials say and do – these are the true indicators of a government’s strategic direction.

Getting public officials to be part of, and ideally take credit for, Ecohealth programs is an important way to influence future policy development in a region.

Policies can therefore be defined as:

• A course of action or plan
• The strategy by which goals are reached
• An authoritative allocation of values.

The final definition highlights both the authority of governments to make decisions that affect people’s behaviour, as well as the value-laden aspect of public policy in moving society toward a “desired future,” through policy action (and inaction). Doing nothing (i.e. the status quo) is always a policy option.

• Policy instruments are what bring policies to life – there are not that many of them

Policy instruments are the tools and techniques used by policy-makers to bring the “strategic direction” and/or “vision statements” of a policy to life. Ironically, the policy instruments that are available are the same whether you are implementing economic, social, environmental, cultural or any other public policy. It is the way you employ the instruments at your disposal, and the creativity you use to design them that make for more or less effective policy interventions.

Policy is fundamentally about inspiring behaviour change in populations (toward the “desired future”) and policy instruments provide the support for this through information and education, as well as the provision of incentives and disincentives for various actions (the so-called “carrots and sticks”).

Those who benefit from public policy may not be the public, however. Many policies shape public behaviour in a way that supports the “desired future” of powerful stakeholders, such as large companies, and the political elite.
Common categories of public policy instruments include: regulation, information, market-based instruments, voluntary initiatives, and organization. Note that regulation is only one of many categories of policy instruments, it is not “policy” per se but is one tool for implementing a particular public policy (or strategic direction). Table 8.2, below, provides some examples of policy instruments in each category. Note that these are only the “instruments” of a public policy – the policies that the instruments are promoting may be (and often are) unwritten.

Table 8.2 Examples of common policy instruments

<table>
<thead>
<tr>
<th>INFORMATION</th>
<th>ORGANIZATION</th>
<th>FINANCIAL</th>
<th>AUTHORITY</th>
<th>VOLUNTARY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advice,</td>
<td>Commissions,</td>
<td>User charges;</td>
<td>Binding:</td>
<td>Labelling</td>
</tr>
<tr>
<td>Exhortation</td>
<td>Inquiries and</td>
<td>Deposit-refund systems</td>
<td>Regulation,</td>
<td>schemes</td>
</tr>
<tr>
<td></td>
<td>Committees</td>
<td></td>
<td>including laws</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>and by-laws</td>
<td></td>
</tr>
<tr>
<td>Monitoring</td>
<td>Government re-</td>
<td>Taxes and tax</td>
<td>Permits,</td>
<td>Self-</td>
</tr>
<tr>
<td>and</td>
<td>organization</td>
<td>expenditures</td>
<td>Licenses,</td>
<td>organization</td>
</tr>
<tr>
<td>Surveillance</td>
<td></td>
<td></td>
<td>Certificates</td>
<td></td>
</tr>
<tr>
<td>Advertising,</td>
<td>Direct provision of</td>
<td>Grants and</td>
<td>Control orders,</td>
<td>Service delivery</td>
</tr>
<tr>
<td>Awards</td>
<td>services</td>
<td>Loans</td>
<td>Stop orders</td>
<td></td>
</tr>
<tr>
<td>Labelling;</td>
<td>Interest group</td>
<td>Subsidies and</td>
<td>Non-binding:</td>
<td>Codes of</td>
</tr>
<tr>
<td>“Right to know”;</td>
<td>creation and</td>
<td>rebates;</td>
<td>Standards,</td>
<td>practice/</td>
</tr>
<tr>
<td>Rankings</td>
<td>funding</td>
<td>Market</td>
<td>Guidelines,</td>
<td>Industry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>creation;</td>
<td>Objectives,</td>
<td>standards /</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Liability</td>
<td>Criteria</td>
<td>Self-regulation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>schemes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To reiterate: it is a mistake to think of policy instruments (particularly regulation) as policies – they are “tools” to implement policy – they are the tools that drive behaviour change. In addition, public policy is implemented at a variety of scales: thus community, local government, national, regional, and international policies are all at work using similar tools to influence stakeholders’ behaviour.

As your skills identifying policy instruments grow, you will start to see political meaning in their selection and form. For example, controversial issues with little political upside are often shuffled off into government special commissions or think tanks. Thus, the policy instrument of organization (i.e. the government’s ability to create new organizations) is used to implement an (unwritten) policy decision to put off decisions about controversial issues, while still allowing the government to appear to take action.

At other times, the perverse incentives created by the instruments may be clear. For example, an Ontario green car rebate program (a financial instrument to implement a policy encouraging clear emissions from cars and thus improved air quality) was changed by a newly elected government to include any car built in Ontario on the rebate list – thus shifting the instrument to reflect an economic growth (not an environmental) policy. This enabled the new government to succeed in “greenwashing” the issue. The new government
kept the popular rebate program for a few months before – very quietly – phasing it out entirely. Most of the public would never have noticed the shift in the rebate list – the environmental community called attention to the hypocrisy of the government’s action.

One reason to focus on newspapers and magazines is that the media often do a good job of publicizing new policy tools and questionable ones. Perverse policies (that say one thing, and so another) can make for sensational stories that get people talking. Such stories can spread quickly on social media (Facebook, twitter, etc), which can help shame the government into changing them.

- **Policy recommendations/ statements should be prepared in advance and “discovered” when opportunities for change arise**

There are many models that try to explain how public policy is made, from the relatively straight-forward policy cycle to the perhaps more realistic “garbage can” model (Cohen et al 1972) to Kingdon’s well-regarded policy streams model (Kingdon 1994). The main criticism of the policy cycle (Figure 8.4) is that it is too logical and implies a linear flow from agenda setting through to implementation and monitoring. The real world has proven to be much messier, but the policy cycle does help people think about the differences between stages of the policy process, and the potential for different actors to influence policy-making at different times. Kingdon’s policy streams model is very briefly described in Figure 8.5, and is mentioned again in the paragraphs below.

![Figure 8.4 Policy cycle, showing multiple stakeholders](image-url)
Downs' Issue-Attention cycle provides another important framework (Downs 1972) for understanding policy change. It highlights the role that crises and other major events can play in generating political and public demand for policy change. Downs' model demonstrates the importance of the pre- and post-problem stages in policy development (Figure 8.6). When the actual “crisis” hits, politicians will be under intense pressure to demonstrate action. The public will be highly engaged and pushing for evidence that politicians are aware of the problem and are “solving” it. As soon as the problem seems to be under control, public interest will shift – or it may be replaced by another crisis on another topic. The public will become aware of the significant costs or structural changes required to really “solve” the original problem (i.e. hunger, poverty, homelessness, climate change). Their interest will drop off and the stakeholders for whom the problem remains a serious issue will work diligently to take advantage of the flurry of interest to make changes to current public policies. When that is done, they will begin to think strategically about what else needs to be done, and will develop policy positions and policy briefs and maintain their network of relationships with key stakeholders until the next crisis presents an opportunity for action. Crises in this model are very similar to “windows of opportunity” in the Kingdon policy streams model.

For the purposes of this module, although three models have been briefly introduced, one key feature of the models will be highlighted: the need to develop public policy proactively.
New ideas and approaches to public policy can become influential very quickly – particularly when politicians need to show an innovative response to a crisis. Change is often driven by particular “problems” that governments decide, for strategic reasons, need to be addressed. Hessing et al. (2005) refer to public policy as “matching solutions to problems in a limited window of opportunity.” These windows of opportunity need to be rapidly identified and taken full advantage of by the Ecohealth community.

Public policies can be thought of as “collections of values, goals, and instruments attached to definitions of public problems that require attention.” Defining the “problems” in new ways, and thus influencing the kinds of solutions that are appropriate is one of the main roles that the Ecohealth community can play. Ecohealth stakeholders can act as policy entrepreneurs who bring well-crafted solutions to the attention of the policy-makers charged with solving the problem (Figure 8.6).

**How can knowledge be best structured for use by communities?**

Good communication is essential to the effective update of new information and ideas. Communication can be defined as “the activity of conveying meaningful information.”

There are many different forms of communication, however – including verbal, non-verbal, written, tactile, and visual/graphical. In many ways, the written form is one of the most limiting – 70% of communication is said to be non-verbal (i.e. facial expressions, body position), and people are much more likely to remember what they see and hear as opposed to what they only read (Figure 8.7).
According to CIHR (2012), the “study and use of knowledge translation involves determining and enacting the most effective manner in which to convey information to a particular community, ensuring that the new information has a meaningful impact within the community and that the results of the new knowledge impact future research and policy.”

Thinking carefully and cultivating effective communication with key stakeholders, particularly community participants and representatives, is an important task.

Just as academic posters and presentations do not go over well with policy-makers, policy briefs and position papers are not effective techniques for communicating with communities. Other approaches are needed. Plain language is very important for communication to non-academic audiences.

Fortunately, there are an infinite number of creative options to exchange knowledge about research findings with communities. The feedback received from this dialogue will help improve the quality of the analysis as well as the usefulness of the results.

Knowing the target audience for the communication, and being clear on the point of the communication activity are two of the most important steps. It is important to focus on one or two clear messages and not overcrowd the message by trying to say too much.

Professional communicators talk about communication channels and communication vehicles. The channels are the way in which a message is sent (i.e. TV, interpersonally, by mail, etc.); the vehicles are the specific ways to deliver a message through a channel (TV via advertisements; interpersonally via a town hall meeting; by mail via brochures, etc). A variety of channels and vehicles can be used to get your ideas and calls to action circulating throughout the community.

Some example of communication channels and vehicles to engage community audiences are listed below:

- Print
  - Advertisements, brochures, comics, stories,
  - Press releases, fact sheets, etc.
- Mail
  - Generic/tailored letters, kits, brochures, etc.
Another important concept to think about when reaching out to the community is that of earned media. Earned media (the opposite of paid media) is the attention your communication efforts generate in the press or in other people’s communication efforts. Articles ABOUT your communication efforts are even more powerful than your efforts on their own. They reach large audiences and create “buzz” about your work. Earned media magnifies the reach of a communication campaign at no additional cost. However, the media can also distort the message if the communication is not clear. The articles often include quotes from the research team (remember to talk in plain language about why your work is important – not the work itself!). Making a concerted effort to let the media and other groups know about your work and your outreach efforts could leverage additional attention and support. Developing your own media skills and preparing your media strategy in advance will enable you to take full advantage of the opportunities provided by earned media.
Background on Plain Language Writing

Albert Einstein had quite a bit to say about plain language writing, although he was not likely thinking in those terms. “Any fool can make things bigger, more complex, more violent. It takes a touch of genius and a lot of courage to move in the opposite direction.”

and,

“If you can’t explain something simply, you don’t understand it well.”

These quotes underscore the importance of plain language communication. Fundamentally, the purpose is not to “dumb down” information, but to make it accessible to your target audience – the general public. There are some general characteristics of the kind of language – in English – that is associated with higher versus lower reading levels. These characteristics may not be universal for other language groups. As indicated in Figure 8.8, in general, plain language writing requires that authors use more personal language (“you should do this”), concrete recommendations (“get vaccinated”), shorter sentences (“Eat many colours of vegetables”), and should use shorter words whenever possible (“help” instead of “facilitate”).

Plain language writing techniques put the needs of the audience first. Its techniques can improve everyone’s writing style, and are very important in making knowledge more accessible, thus improving the quality of services provided (particularly when it leads to clearer forms, documents, letters, and signs). It promotes honest and open communication. It is neither patronizing nor simplistic, and the information provided must be accurate and complete. At times, technical terms are necessary, and they should be defined in plain language for the reader.

![Figure 8.8 Different characteristics of Grade 4 and Grade 12 writing](image)
## 10 Plain Language Writing Tips:

1. **Use the active voice (present, past tenses)**
   
   I see, not I have seen (passive verb tense).

2. **Write directly to your reader**

   Use terms like “you” and “your family”.

3. **Use a positive tone wherever possible**

   People are more receptive to positively framed messages.

4. **Use common words rather than technical jargon**

   If you must use a technical term, make sure to define it in plain language.

5. **Use short words and sentences**

   Avoid semi-colons.

6. **List important points separate from the text**

   Bulleted lists can be easier for people to read.

7. **Write instructions in the order you want them carried out**

   Make sure the instructions are clear and detailed. A numbered list may help.

8. **Don’t change verbs into nouns**

   For example, use “requires” not “the requirement is to”; or “establish” not “work on the establishment of”.

9. **List items in a parallel form**

   Use a parallel structure for lists – i.e. all starting with the same kind of word (verb, adjective, etc).

10. **Pre-test what you write**

    Take your message to your target audience and ask them questions about what they think it means – then redraft your text to make it clearer.
Background on Policy Briefs

Policy briefs can be written by bureaucrats for their Ministers, or by non-governmental actors who are interested in influencing public policy. In government, they are used to keep decision-makers informed about issues for which they are responsible; in fact, briefings may be the principle means of communication between managers and their Ministers.

Outside of government, policy briefs provide a succinct mechanism for presenting a policy position. They are shorter than a position paper (or “white paper,” a more detailed presentation of a policy argument), and can be more persuasive than an advocacy letter, particularly when multiple organizations agree with the premise of the policy brief, and support it with their logos or signatures.

Policy briefs enable senior officials to be versed on a topic which they may not have any background in, or the time to research on their own. As such, they must be clear, concise, and reliable.

In government, there are often very specific rules surrounding the content of policy briefs, including the formatting and approval process. Many departments have their own briefing note/policy brief template; for example, Health Canada has approximately sixteen different templates. Government authors must be incredibly conscious of the language chosen as these documents can be the official record of a government’s position on an issue.

Policy briefs are generally limited to two to five pages. Before writing a policy brief, the author(s) should be clear about:

- The purpose (why they are writing a briefing note)
- The reader (for whom they are writing the briefing note)
- What that person needs to know
- What points they will cover
- How they will structure the information.

There are often standard formats for briefing notes; however, they generally include the following elements:

- The purpose
- A summary of the main facts
- The conclusion.

Sections that may be relevant to include in a briefing note include, but are not limited to:

**Issue:** A brief summary of the purpose of the policy brief; the issue, proposal, or problem that sets out what the rest of the note will be about.

**Background:** A factual description of the issue including information such as a chronological history, context, precedents, etc. This section should include all of the information the reader needs in order to understand the rest of the brief, without repeating information from other sections.
**Current status:** A brief description of the current situation, including who is involved in the issue.

**Key considerations and options:** An unbiased summary of the important facts, considerations, problems, and developments that will be necessary for the reader to make an informed decision. This section may also include a concise description of the plausible options available to the decision maker, including possible risks and opposition.

**Conclusions and/or recommendations:** Outline a recommended course of action and explain why.

**References for Plain Writing**


MODULE 8 – HANDOUT 4 – ACTIVITY 4

Media Skills

The first part of any media training exercise should start with a discussion regarding the media itself. The motivations of the press are very different than those of academics or professionals. The press has to “sell” their story – they need people to click on the link to their articles, or to keep watching or listening to their TV or radio report. Thus, sensationalism and entertainment can be as motivating (perhaps more) as getting the facts of a matter across to the public. Understanding this, it is important that people prepare themselves in advance to speak with the press. Talking to the media is a great way to communicate the value of the work that is being done – as mentioned in the researcher section, above, it provides an opportunity to talk about why your work is important – not the specifics of what you are doing.

Keeping control of the interview or public event (press release, town hall meeting) is important to keep your message on track. The WHO guide “Effective media communication during public health emergencies” outlines a number of practical steps to interacting with the media in a way that helps ensure that they report what you mean.

Using the five step model in the WHO guide and the related worksheets as a resource, encourage the group to think of an Ecohealth-related topic that they could be asked to comment on – for example, a zoonotic disease outbreak, or an environmental disaster.

The key steps are outlined in Table 8.3 below. Note that the first step is to express your common humanity with the audience (empathy, caring, compassion, listening, etc). The second step is to state the key message. The WHO’s 27/9/3 formula is based on reviews of the “sound bites” used on television and radio – essentially, to get on the air, the core message should be approximately 27 words, take a maximum of 9 seconds to deliver and can contain up to three clear messages. The message template provided in the Guide can help participants craft their message. Examples of 27/9/3 statements include:

- Smallpox spreads slowly. This allows time to trace those who have come in contact with the disease. Those who are traced can be vaccinated to prevent illness.
- Mosquitoes carry the West Nile virus. Protect yourself from mosquito bites. Report dead birds to local health authorities.

Try reading them out!

The third step is to provide additional information using three additional facts per message and/or a personal story. Then you should repeat the key 27/9/3 message and lastly, state specific next steps.

While the WHO Guide is tailored to health emergencies, the techniques are equally valid for other messages that involve the press. Practice is essential to being able to confidently and consistently get your message across to the media.
### Table 8.3 WHO 5 Step Model for Effective Media Communication during public health emergencies

<table>
<thead>
<tr>
<th>Answers Should:</th>
<th>By:</th>
</tr>
</thead>
</table>
| 1. Express empathy, listening, caring or compassion as a first statement | • Using personal pronouns, such as ‘I, we, our, us’  
• Indicating through actions, body language and words that you share the concerns of those affected by events  
• Acknowledging the legitimacy of fear and emotion  
• Using a personal story, if appropriate (e.g. My family...)  
• Bridging to key messages |
| 2. State the key messages | • 27 words, 9 seconds, 3 messages  
• Using positive, constructive and solution-oriented words, as appropriate  
• Setting messages apart with introductory words, pauses and inflections |
| 3. State supporting information | • Using three additional facts per message  
• Using well-thought out and tested visual material  
• Using a personal story  
• Citing credible 3rd parties or other sources of information |
| 4. Repeat the key messages | • Summarizing or emphasizing key messages |
| 5. State future actions | • Listing specific next steps  
• Providing contact information for obtaining additional information, if appropriate |

Source: (WHO 2007)

**Resource for Media Skills:**


This guide may be available in a number of different languages.